

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Liquid-Cooling Primary-Loop Circulation Pump market size is expected to reach \$ 1080 million by 2032, rising at a market growth of 17.4% CAGR during the forecast period (2026-2032).

Primary-loop circulation pumps for high-density liquid-cooled data centers refer to pump units and packaged pumping systems deployed on the facility side or primary side of liquid-cooling infrastructure in AI data centers, high-performance computing facilities and other high-density digital infrastructure. These pumps circulate chilled water, condenser water, water-glycol mixtures or other facility-side heat-transfer fluids between cooling towers, dry coolers, chillers, heat exchangers, distribution pipework and the primary-side interface of coolant distribution units. Their principal role is to maintain the required flow, head and differential pressure for continuous heat rejection while supporting variable-speed operation, redundancy architecture, monitoring, BMS/SCADA integration and energy-efficient control. Typical product forms include in-line centrifugal pumps, end-suction pumps, split-case pumps, vertical multistage pumps, canned motor pumps, magnetic-drive pumps, variable-speed pump packages and prefabricated hydraulic modules. On a 2025 global project procurement basis, standalone pump units generally range from approximately USD 5,000 to USD 120,000 per unit, while packaged pumping skids and prefabricated hydraulic modules may range from roughly USD 80,000 to over USD 500,000 depending on capacity, redundancy, materials, controls, certification and site delivery requirements.

Based on our research, primary-loop circulation pumps for high-density liquid-cooled data centers should be understood as a high-reliability application of mature pump technology rather than as an entirely new pump category. The underlying

products?centrifugal pumps, in-line pumps, end-suction pumps, split-case pumps, variable-speed pumps and packaged pumping systems?are well established in HVAC, industrial cooling and hydronic infrastructure. What changes in the liquid-cooled data center environment is the operating context. These pumps must support continuous 24/7 operation, redundancy, stable flow and differential pressure, integration with CDU primary-side interfaces, and coordination with chillers, dry coolers, cooling towers and heat exchangers. The value proposition is therefore shifting from equipment supply alone to hydraulic reliability, control precision, energy efficiency and uptime assurance.

From a supply-side perspective, the market is led by established pump and fluid-technology groups with deep HVAC, hydronic and industrial cooling capabilities. Grundfos, Wilo, Xylem, Armstrong Fluid Technology and KSB have the strongest combination of global engineering coverage, mission-critical cooling experience, smart pump controls and data-center-specific product evidence. Alongside these leaders, several mid-sized and specialist manufacturers are becoming increasingly relevant. Calpeda, MP Pumps, GemmeCotti, SPECK and Taco Comfort Solutions illustrate how stainless-steel pumps, magnetic-drive pumps, mission-critical pump packages and industrial cooling expertise can be repositioned for high-density liquid-cooling infrastructure. In China, Shanghai Kaiquan Pump Group and Nanfang Pump Industry already show stronger public evidence of data-center-related pump activity, while other domestic pump makers remain in a watchlist category pending clearer official product or project disclosures.

Demand is being reshaped by AI and high-performance computing. As rack densities rise and conventional air cooling becomes less economical at the high end, liquid cooling is moving from pilot projects into larger-scale deployment. In this context, the primary-loop circulation pump is not the most expensive item in the cooling chain, but it is structurally important. It governs the stability of facility-side heat transfer, contributes to pumping energy consumption, and affects redundancy, maintainability and operating risk. This means that procurement criteria are likely to place greater emphasis on system efficiency, variable-speed performance, redundancy design, materials compatibility, lifecycle service and digital monitoring rather than only on pump purchase price.

Policy and sustainability pressures are reinforcing the same direction. European data-center energy-performance reporting and rating initiatives are making PUE, WUE and operational transparency more visible, while Asian markets are increasingly linking new data-center approvals to power availability, cooling efficiency and water-resource

constraints. These trends support demand for higher-efficiency pumps, prefabricated hydraulic modules and more intelligent control architectures. Over the medium term, competition is expected to move away from generic HVAC pump substitution and toward application-proven liquid-cooling pump packages that can be specified early in the design phase, delivered rapidly for large AI campuses, and maintained with minimal operational disruption.

This report studies the global Data Center Liquid-Cooling Primary-Loop Circulation Pump production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center Liquid-Cooling Primary-Loop Circulation Pump and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Data Center Liquid-Cooling Primary-Loop Circulation Pump that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump total production and demand, 2021-2032, (Units)

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump total production value, 2021-2032, (USD Million)

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Data Center Liquid-Cooling Primary-Loop Circulation Pump domestic production, consumption, key domestic manufacturers and share

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump production by Product Configuration, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Data Center Liquid-Cooling Primary-Loop Circulation Pump market based on the following parameters - company overview,

production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Grundfos Holding A/S, WILO SE, Xylem Inc., Armstrong Fluid Technology, KSB SE & Co. KGaA, Taco Comfort Solutions, Calpeda S.p.A., MP Pumps, Shanghai Kaiquan Pump Group, Nanfang Pump Industry, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Data Center Liquid-Cooling Primary-Loop Circulation Pump market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Product Configuration, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Market,
Segmentation by Product Configuration:

Standalone Pump Unit

Packaged Pump Set

Prefabricated Hydraulic Module

Other

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Market,
Segmentation by Pump Design:

In-line Centrifugal Pump

End-suction / Split-case Pump

Vertical Multistage Pump

Sealless / Magnetic / Canned Motor Pump

Other

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Market,
Segmentation by Working Fluid:

Water

Water-Glycol Mixture

Treated / Deionized Water

Specialty Coolant

Other

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Market,
Segmentation by System Location:

Facility-side Primary Loop

Chilled-water Loop

Condenser-water / Heat-rejection Loop

Hybrid Loop

Other

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Market,
Segmentation by Application:

AI Training Data Center

AI Inference / Cloud Data Center

HPC / Supercomputing Facility

Colocation / Enterprise Retrofit

Other

Companies Profiled:

Grundfos Holding A/S

WILO SE

Xylem Inc.

Armstrong Fluid Technology

KSB SE & Co. KGaA

Taco Comfort Solutions

Calpeda S.p.A.

MP Pumps

Shanghai Kaiquan Pump Group

Nanfang Pump Industry

EBARA Corporation

GemmeCotti S.r.l.

SPECK Pumpen

Torishima Pump Mfg.

TERAL Inc.

Johnson Electric

Moog Inc.

Key Questions Answered:

1. How big is the global Data Center Liquid-Cooling Primary-Loop Circulation Pump market?
2. What is the demand of the global Data Center Liquid-Cooling Primary-Loop Circulation Pump market?
3. What is the year over year growth of the global Data Center Liquid-Cooling Primary-Loop Circulation Pump market?
4. What is the production and production value of the global Data Center Liquid-Cooling Primary-Loop Circulation Pump market?
5. Who are the key producers in the global Data Center Liquid-Cooling Primary-Loop Circulation Pump market?
6. What are the growth factors driving the market demand?

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